

التنمية العربية

في عـــــــالم متغير

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أستاذ جامعي وخبير تعاون دولي

الأمانة العامة لمجلس الوزراء

قطر – الدوحة

(11) gÀÎÂƨã àäøşÛ

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[illegible]

[illegible]

[illegible]

2 - [illegible]:

[illegible]

[illegible] (26000) [illegible] 1990 [illegible] (6000) [illegible] 1999 [illegible] (OECD) [illegible] (12) [illegible] 2003 [illegible] .[7]

ƘǴùǒηĂ!Ăǉǂƙ!ƒ ǉƦǋ Ĭǈ Ƶ ýĂƮơ!ƒ Ƚ5ǈǂ ƒ ƿǴǉƙĂ ÜƔǉǴη ǇǆǇ ƭǒĂƪƙ!ƒĂ ƔǒƧƥƙ!ƒĂ
(14).ƧƤǄ ƔǉǴη ǇǆǇ ǴǌƙǴǀǒǊƱƙĂ

ÜȽùǆǴƶ!ƒ Ư ƒƧƹǖ! ǴǒηĂ!ĂǉǂƙƘǓǴƮƙǓƒĂ ƘǴǆĂǈƶǆ!ƒ ǴǒηĂ!ĂǉǂƙƧǊƙƶƙĂ
ýǒǂƬùƙ! ƾƥùǒƥη ǴηƦĂǆǉ ýƤƥƙ ǑǋĂ .ǋƙǆƧǊ ƥǴƮƙƿǓƒ Ĭǈ Ƶ ƧƛǄ ƘƒƦ ǁ!Ʀǋ ǑǋĂ
.ȽǒǆǉƙƘ!ƒ ýηǄ ǇǆǇ ǴǒηĂ!ĂǉǂƙƘ!ƒ ǊǌǉǑ5 ǴǒƧǋĂη ƾƧǒǒƺƙ ȽƛƥơǆǓÜȽǒƥǴƮƙƿǓƒ ȽƱƬǉǓƒ
:ǑƙǕ! Ǵǀ5Ă ƥǒƥη!ƒ ǈƦĂǆǉ!ƒ ƒƦǌ! Ƚƪ ǒƑƧ!ƒ ƔǉƒĂη!ƒ ƒ ǒƤǈƙ ǇǂǆǒĂ
ǇǆǇ - ǇĂǂǒ ǇǄ ǇǂǆǒƘǓǴƮƙǓƒĂ ƘǴǆĂǈƶǆ!ƒ ǴǒηĂ!ĂǉǂƙƘ! Ĭ ƥǴƮƙƿǓƒ ƧƛǕƒ ǇǊ -1
Ǒù5 Ǵùǌǀǒǉ ƱƙĂ ǴǌǆƒƥƤƙƪƒ ýƶ5ǉ ǀƧƬǴǈǆ!ƒ Ƨǒƹ ƧǴƛǓƒĂ ȽǒηƧǴƤ!ƒ ƘƒƧƛƋǆ!ƒ Ƚǒơ
Ǒùǈơǆ!ƒ ǊƙǴùǉ!ƒ Ǒù5 ǀƧƬǴǈǆ!ƒ ǴǌƙǆǋǴƪǆ ǇǆǇ Ƨǉǂ ǄƤ - ƥǴƮƙƿǓƒ ƘǴƵǴƱƿ ƻǈƙƤǆ
.ǇǴƙǉǓƒ ƘǴƵǴƱƿ ǇǆǇ ƳǴƱǀǂ Ǒ!ǴǆηǓƒ

ǇǴùƙǉǓƒ ǄǒùƲǉƙ! ƥùǒƥη!ƒ ƱǆǉùĂǋ ȽǒηƧǴƤ!ƒ ƘƒƧƛƋǆ!ƒ ǄǋǄ ƥơǄ ǇǊ -2
ǇǒùǊ ƘǓǴƮƙǓƒ ýǒƧƪƙĂ ƻǒ!ǴǂƙƘ! Ư5ƤĬ!Ǌ Ǒư5ǒ Ĭ Ʀ!ƒ Üǁǖǌƙƪ ǓƒĂ
ǉƦùǋ ǇƎù5 ÜȽùǒǆǴǉ!ƒ ýĂƥ!Ǵǉ ƭǈƶƙǒ Ǵǆǒ5Ă .ǴǌǉǒƪơƙĂ ǇǒƥǴƮƙƿǓƒ ǴǕǂĂ!ƒ
Ƚùǆǒǀ!ƒ ýùƪǖƪ Ǒ5 ǇǴǆƥǉǖ! ǀƥǒƥη ǴƮƧ5 ƘƧ5Ă ƥƿ ǇĂǂƙ ƘƒƧǴǂƙǓƒ
.ƧǒƥƮƙ!ƒĂ ǇǴƙǉǓƒ ȽƱƬǉǄ ýǒĂǉƙ!Ă Ƚǒǆ!Ǵƶ!ƒ

ƘǴùǆĂǈƶǆ!ƒ Ǵùǒ ηĂ!ĂǉǂƙƳǴùƱƿ Ǒù5 ȽƵƧǴƪƙǆ!ƒ ƘǴƵƒƧƙƤǓƒ ǀƧǒƙĂ ǇǊ -3
ǉƦùǋ Ĭùǈ Ƶ ýĂƮơ!ƒ ƻǒ!ǴǂƙǀƧǒǉǂ ǀƧĂƮǊ ƘƮǈƿ ƥƿ ǋƙƒƦ ƘǓǴƮƙǓƒĂ
ǆƒƥƤƙùƪƒ Ĭùǈ Ƶ ȽǒƱƒƧƿĂǆǒƥ Ƚǆƪ ǇǴ5ưƎǊ ǁ!Ʀ ơǆƪ ƥƿĂ .ƘǴǒηĂ!ĂǉǂƙƘ!ƒ
ǇǒƦù!ƒ ǇƒƧùǀ5!ƒ ýǊƿ ǇǆǇ ǁ!Ʀ Ǒ5 ǴǆǊ ÜƘǓǴƮƙǓƒĂ ƘǴǆĂǈƶǆ!ƒ ǴǒηĂ!ĂǉǂƙǑ5 ƘǴǒηĂ!ĂǉǂƙƘ! ǉƦǌǊ ƦƤǕƒ ýǌǉƪ Ǵǆǂ ÜǇǆǌƮǒƵ ýǊƪ ǇǒƪơƙǴǌǉǒĂǆƥƤƙƪǒ
.Ƨǀ5!ƒ ǇǆǇ ƥơ!ƒ ǊǆƒƧǊ

4- [illegible]

5- [illegible]

6- [illegible] (15).

[illegible]

[illegible]

2- ƗǒŋƧǴƤ!ƒ ƗǒǉǍǒƥǆ!ƒ ƇƔƵ ƻǒƺƤƙ.

3- ǉƥǴǒƨ ǉƇǴƺ!ƒ ǉƥǴǉǓƒ.

4- ýǒŋƬƙ!ƒ ƗƪƺǴǉǆ!ƒ ǍƉ ýǒǉǉƙ ƇǴƵǕƒ ƗǒǴǆ!ƒ ƗǒƧƒƥǗƒǍ ǑƙƔƒ ǴǈǆǆƠƙƙ ƗƔǍƥ!.

5- ýǒŋƬƙ ƧǴǆǍƙƪǕƒ ƒǴƤ!ƒ ƒ ǑǉǓǍ!ƒ ǕǑǉǉŋǕƒǍ ƠƙƺǍ ƘǕǴŋǆ ƵƥǒƥǉƉ ǊǆǴǆǉƉ.

6- ƙǑǍƠƙ ƪǍƒ ǕƗǒǴǆ!ƒ ǍƥƓƺƨƇ ƙƤƥýǒ!ƠƗǍǆƗ ǑƶƤƧƒƪƒƘ ý!ƙƬƼǒý.

ǊǴǆ ǉƇǉ!ƇƺƉ ƗǉƥƬƪƥǆƗ ƴƥǉǉ!ƺ ƵƙƥƏǆƗ ƻƥǆƗǆƵƥǉ ƬƤƙƬƤƗ ƥƥ ǍǉƬƙƧ ǑƳ

ƳǒƖǴ!ƙ ǍƦǉƗƙ ƊƔƵ ýƙǆƗƪƗ – ǉǉƗƥ!ƙ ƇƔƵ ƒǍƒƥƚƗ ǉƵǉǉ ƥƦƗǑ ƧƒƤƔǕ

ƵƗƔ ƵǉǉƗ ƴǴƇǍƗ ƥƨƗƬǆ ƧƥǆƥǍƗ ƻƥǍƥƗƙ ƥǋǉǒƗ ƥǍƦǒƗƥƒǒƗ ...ƒ!ƚ. (17)

ǍŋƥǒƧ ƨǉƨƦƗ ǉƶƤ ƻǆƬƵƧƒ ƬƤƬƤƗ ƒ!ǉƗƒ!ƊǴƺ ƒ!ƵǴǆ ƥƥ ƗǴƪƉ ƗǉƦǉǆƗ

ǉƥƬƪǉƥƒ ǉƥƦƒƥƇƬƗ ƬƦƙƙǍ ǉƦƗ ǉƒǴƤǍǉǒƥƒ ǉƓǍƙǉƒ ǉƓƬǉǑƙǍƥƒ ǉƥƗƦ ǍƥƒƧƙƺǉǍ

ƒƥƚǉƒ ƥƗƒƙƒƒ ƪǍǆƚǉǉƗ ƗǍǉǍƪ ƗǉƙƒƬ ǉƳƥƥ ǉƬƤǉƬƥƗ ƥƥǆƥƗ ǉƥƬƦƳǉ ƗƒƪƗǉƇ ƪǉ!ƒƗǉ!ƒ

ǉƬǉ!ƥƬƬƙǉƒ ƗƬƤƬƤƗ ǉǴƧƒƥ ƦƒǍƦ ƥǍƪƒ ǉǴƒ!ƒ ǉƩƬǆ ǉƓǴƙƙƗ ǉƒǴƒ! ƬƒǍǆƒ ǉƪƥƗƬƒ

ǉǴƥƒǉǉ ǉǒƥƥƫǉǒ ǉƳƒ ǉǒƒ ƪǉƵǴ!ƥǉǆƬƥ ǑƬƥǆǴƧ ƥǉƳƒ ƗǍǉǉ ǉƪƒ ƺǉƪƥǆǒ ǉǉǉ ǉǍƗƊ ƵǉǒƗǉ

ǉƦǴƥǆƳ ǉƗǉƒ ƗƬƤƬƤ!ƒ ƗǉǉƬƥƒ ǉǉǉǍǆ .ƪƒǉ!ƒ ǉǒǉ!ƒ ǉƶǆǉǉƗ ǉƒǴƒ! ǉƥǉƗǍƥƒ ǉǒǍƥǉ ǑƳ

ƒƥƒƦƔƒ ǉƗƥǒǆǴƥ (342) ƒǉǉǴ ǍǉƤ2000-ǍƤ1990 ǉƬƒǉ!ƒ ƦƥƒƗǍƥ ƥƥǍǉƧ.(18)

ǍƧƒƥƪƦ ƗǉǉƗƒ ƬƤƬƤ!ƒ ƓǍƪƦ ƗƒƦƒƥƒƥǉƥǉ ǍƥƔƬǉƗƥǉ ǉƒǒƒ ǉƒǴƒ!ƒ ǉǉƧƒ!ƒ

ǉƥƥƒƳƳ ƥǉ!ƒ ǉǉƥ ǉǉǍƥƒƒƥǉƒ ƗǉƦǒƥ!ƒ ǉǍƥ!ƒ ƊǉƥƒƪƦǉǉƒ ǍƥǉǆƗƒƥƥǉ ǉƓǉƥ ƥƥƒ!ƒƦ

ƗǉƥƬƤƒǉƦǉ ƒƧƒƥǒƥƒ ǉƦǉƗǒƥ ǉƦƒǉǉƗƒǉǉ ƥƗƒǉǉ ǉƒƦǉƒǉǉƒ ǉǉǉǉǉǉƬƗƒǉǉ ƪǍƥǉƦƒƥƥǉƒ

ǉƒǉǉƒǍŋ ǑƳ ƗǒƧƒƥǗƒ ƥƒǒ!ƒ ǑƬƨƙǍ ƥǴƬƤƥǉƒ ǉǉǉƵ ǉƒǴƺ!ƒ ǉƒǴƪ!ƒ ƗǉǉǍǉǉǉ ǉǉǉ ƙǉǉƉ

ƻƥǉǉƒƒƥƗ ǕƥƧƒƥǆƒ ƒ ǑƬƤƙ ǑƳ ƪƒƒ!ƒ ƗǒƗƒ ǉǉƵ ƓƗƬƧƙ ƗǒŋǍǉƒƧƒƥƒ ǉ!ƒ ǕƗƳǴƗ

Ŏǐơdžǃƒ ǋƙǤǉǃƒ ţ Ǥdžǂǉƒ Ǐǃǫ ŎǃĂƥǃƒ ƥǀǉǃƒ ƫĂƥǉƮ! ǂǒǃǤơǃƒ ƘǤƶpĂƙǃƒ ƧŏƬƙĂ
ǏǃĂŰƒ ǀƧdžǃƒ ŎǋǊĂ Ü2009 ǍǤƵ Ŏ5 %2 ǂƿƮǉƿ ǂdžƥǀƙdžǃƒ ƘƒƥǤƮƙpŬƒ Ŏ5 ŎǃǤdžƞŰƒ
ƴdž ÜǂŏǉǤƛǃƒ ǂŏǉĂǂǃƒ ƔƧơǃƒ ƥƶƿ Ǥdž ǂǐơƧdž Ŏ5 ǻƬǤdžǂǉƒ ǋƙǤǉǃƒ Ǥǌŏ5 ǿƞƮŏ Ŏƙǃƒ
-1980Ă 1975-1974 ŎƙƧƙ5 Ŏ5 ǂǐƞƮdžǃƒ ǀƧǤƮƤǃƒ ǿƥǤƶƙ ǂŏdžǂƒƧƙ ǀƧǤƮƤ
ǏǐƵ ǿƬŏ! 2009 ǍǤƵ ƧƤƒĂǄ Ŏ5 ǋƙǤǉǃƒ Ŏ5ǤƶƙǄƥƿŏ ǇǄ ƴƥĂƙŏ ǁǃƦ ƴdžĂ .1982
ǏǐƵ ǂǀƮǉdžǃƒĂ ǂǐdžǤƬǃƒ ƧŏƿƒƥƙǃƒǇdž ƥŏƨdž ƦǤƤƙƒ Ǎƙ ƒƦǫ ǁǃƦĂ Ü2010 ǍǤƵ Ŏ5 %1
Ǐǃǫ ǂŏƥǤƮƙpŬƒ ƳǤƭĂŰƒ ǀƥĂƵ Ŏ5 ǍǌƞƮƙ ǂŏơƿ ǂǃǤdžǃƒ ƘǤƮǤŏƮǃƒ ăĂƙƮdž
ǤƒƧƞǫĂ ǂdžǤƶǃƒ ǂǃǤdžǃƒ ǇǄdž ǂŏĂp ǂŏƱŏƬǉƙ ǂƶ5ƥ Ƨŏ5Ăƙ ǏǐƵ ǀĂǔƵ ÜƫƒĂƮŰƒ
.ǂdžƥǀƙdžǃƒ ƘƒƥǤƮƙpŬƒ ǇǄdž ƧŏǍǂ ăƥǃ ǀƥƑǤ5ǃƒ ƧǤƶƮǄ Ŏ5 ǀƧŏƿǂ ƘǤƭŏ5Ƥƙ

Ǥǌŏ5 ĂdžǉǃƒƥǋƬŏ ǇǄ ƴƥĂƙdžǃƒ ǇǄdž5 ǂŏdžǤǉƒĂ ǀƥƵǤƬǃƒ ƘƒƥǤƮƙpŬƒ Ŏ5 ǤdžǄ
Ƙơƙ Ü2009 ǍǤƵ Ŏ5 %3.25 Ǐǃǫ 2008 ǍǤƵ Ŏ5 %6.25 ǇǄdž ǻƥǤơ ǻƌƱǤƿƙ
ÜǤǌǐŏĂdžƙ! ǂǋƞĂdžǃƒ ƥƧƒĂdžǃƒ ƯǤ5ƤǉƒĂ ƘƒƧƥǤƬǃƒ ǏǐƵ ƔǐƱǃƒ Ŏ5 ƴƞƒƧƙǃƒ ǀƌƱĂ
Ŏƙǃƒ ƘƒƥǤƮƙpŬƒ Ŏ5 ǻƬĂƬƤ ƿŏĂdžƙǃƒ ƥĂŏp ƥǤŏƥƨƒĂ ÜǂŏǃĂŰƒ ƴǐƮǃƒ ƧǤƶƮǄ ƱĂƿǋĂ
(23).ǀƧŏƿǂ ƘŬǔƙƤƒ ǇǄdž ŎǉǤƶƙ

- 2 :ÜǄǆƴǐƐ ǄƳ ǄǆǂƯƴǐƐ ǭƐǭƳǋ ǭǏƐƦǂ

ƧƱǤƤdžǃƒ ƥƬǄ ǇǄdž ƿdžƶǃƒ ƫĂƮ ǏǐƵ ǂǒdžǃǤƶǃƒ ǂǃǤdžǃƒ ǂdžƨŰƒ ƘǤƮǤǂƶǉƒ ƥƶƙ
ƧĂǋƥƙĂ ǀƧŏƿǂ ǀƨǋ Ǐǃǫ ƿdžƶǃƒ ƫĂƮ ƯƧƙ ǂŏơ ÜǂdžƨŰƒ ǇǄƵ ƘǌƬǉ Ŏƙǃƒ
ǇǄdž Ƨŏƿǂ ƥƥƵ ǇǄƵ ŎǐƤƙǃ! ǤǋƧƱƯƒ ǤdždžŏƘǂƧƬǃ! ǏƧƒƥŰƒĂ ŎǃǤdžǃƒ ƴƯĂǃƒ
ƥǤƮƙpŬƒ Ŏ5 ǂǃǤƱƿǃƒ ƿƥƶdž Ǐǃǫ ƘƒǤƮơŰƒ ǂƥơǄ ƧŏƬƙ ǂŏơ ÜǤǌŏ5ƲĂdž
ƥƥƵ ǇǄ Ǥdžǂ Ü1974 ǍǤƵ ƦǉdžǇ ƿƥƶdž ǏǐƵǄ ĂǋǊĂ %7.5 Ǐǃǫ ǿƬĂ ƥp ŎǂŏƧdžǃŰƒ

LJD ýþĂkdž!f LJdž5 Ŧöŋöİ̈P!f ÉŢĂŢP Ŧöƕƨž!f ƘfƨĜdžĂk˥Ǖf f Pö Ĝdžƕ5 ĜdžD
ƨĜöİdž 450 Ăơƕ Ŧöŋöİ̈P!f Ŧöþĝö˥!f lĂƨĂ!f ƽöþĜǰŢ Ŏ5 ýĂŢǕf ƨFĜ˥P ýŢk
ƨĂƌö˥ Ĝdždž Ü ƽöþĜǰŢ!f ǁİk! ŦöƨĜdžĂk˥Ǖf ƔFĜlơ!f Ŧdžöp Ŏ5 yŋfƨk!f Ɣƕ˥ƕ ƨǕĂþ
(32).2009 ĎĜƵ ýűP ĜnjFfþD Ĭİ̈Ƶ

ĈfƨŊ LJdž ƘfƨĜdžĂk˥Ǖf ljŖNj LJƵ Ƙdžŋǰ Ŏk!f ƨFĜ˥P!f LJƌ5 ƨŦŖ!Ĝƕ ƨöþŋĂ
ĜnjkfƨĜdžĂk˥f ƘĜöŋökfƨk˥fĂ ƘĜ˥Ĝö˥ ŦƶŋfƨdžŦöŋöİ̈P!f ýĂþ!f LJdž ƔİƱkk ÜŦdžƨǕf
ÜƘĜƵĜƱl!f ǁ!ŖŦĂ ÜĜnjö5 ƨdžĂk˥dž!f ýĂŢǕf YĂǰ ăĂk˥dž Ĭİ̈Ƶ ɰƨĜP!f Ŏ5
Ăơǰ Ĝnj! Ŏİ̈Ŧ!f Ďžŋơ!f Ʃİƕö Ŏk!f ƽöþĜǰŢ!f ljŖNj ƘfƨĜdžĂk˥Ǖ Ŏ5fƨʒŋ!f yöƨĂk!fĂ
Ŏ5 Ŧöþĝö˥!f ƽöþĜǰŢ!f ýĂŢD Ŏ!ĜdžŊǫ LJdž %45 ýŦTk Ü ƨǕĂþ LJĂöİöƨk 1.5
Ĭİ̈Ƶ Ŧödž!ĜƵ!f ƽöþĜǰŢ!f ƨƕŦƌŦ ƨĜdžĂk˥ű! ŎƕƱ Ăƕ ƽĂþǰŢ ƻǰŢöĂ. Ďİ̈ĜƵ!f
ƘĜ˥˥ƌdž!f Ƙfƨöþlk! ÉI5Ă ƨǕĂþ ƨĜöİdž 875 Ŏ!fĂơ Ʃİƕö Ŏ!ĜdžŊǫ þöŢƨƕ ƽűƱǕf
ƽöþĜǰŢ!f ƨƕŦD ŎǰĜĂ ŎköĂŦ!f ƨĜdžĂk˥ű! ŦdžĜƵ!f ŦFönj!f ƽĂþǰŢ ǁİkdžö Ĝdžö5 ÜŦödž!ĜƵ!f
(33).ƨǕĂþ ƨĜöİdž 250 Ŏ!fĂơ Éödž!ĜƵ yƕfƨ!fĂ Ŧöŋöİ̈P!f

ĎĜƵ ýűP ƨƕŦD lƨĂŢƕ Éơưfă ŦdžɘǕf ljŖNj ƨöĂdk LJĂŦö LJD ýþĂkdž!f LJdžĂ
ýĂþ!f LJD Ĭ!ǫ ŦöþĜŢkpǕfĂ Ŧö!Ĝdž!f ƘĜ˥˥ƌdž!f ƔİƩD ƘĜƶpĂk ƨöTk Ŗǫ Ü 2009
LJD ýþĂkö Ŧöơ Ü ĭþĜŢkpǕf Ădžǰ!f ƘǕþƶdž Ŏ5 ɫƌƱĜƕk þnjTk þp Ŧöŋöİ̈P!f ŦöƱ5ǰ!f
Ăơƕ ŦǰƨĜldž Ŏ!Ĝơ!f ĎĜž!f ýűP %5.1 Ăơƕ Ĝnjö5 Ŏ!ĜdžŋǕf Ŏİ̈ơdž!f ƝkĜǰ!f Ădžǰö
Ŏ5 lƨöƕŦ ýfĂdžD ɰĂƨP Ĭ!ǫ ƌƱĜƕk!f fŖNj ƨö˥5k LJŦdžöĂ Ü2008 ĎĜƵ Ŏ5 %7
Ĭİ̈Ƶ lĂűƵ Ü ƘfƨĜlž!f YĜƱp YĜưĂD ĭþƨkĂ Ďžnj˥Ǖf ƽfĂ˥D ƘfƨĜönjǰf ĈĂư
ƝöİP!f ýĂþ! Ŧö!Ĝdž!f ƘfþfƨöǕf Ĭİ̈Ƶ ƝkĜ˥ĜŦƶǰfĂÜ Ʊ5ǰ!f Ĭİ̈Ƶ ƔİƱ!f Ŏ5 Ădžǰ!f ƌƱĜƕk

الفصل الثاني
التحديات التي تواجه التنمية العربية

الفصل الثاني - التحديات التي تواجه التنمية العربية

[illegible]
[illegible]:

أ- [illegible] 2006 [illegible] %25 [illegible] (44) [illegible] %36.5 [illegible] (47) [illegible] %5 [illegible] (58) [illegible] %29.5 [illegible] (64) [illegible] %26.3 [illegible] (77) [illegible] %21.3 [illegible] (80) [illegible] %19.9 [illegible] (81) [illegible] %18.7 [illegible] (94) [illegible] %13.6 [illegible] (97) [illegible] %12.7 [illegible] (98) [illegible] %12.2 [illegible] (109) [illegible] %9.5 [illegible] (115) [illegible] %8 [illegible] (117) [illegible] %7.7 [illegible] (121) [illegible] %7.4 [illegible] (126) [illegible] %6.6 [illegible] (143) [illegible] %3.9 [illegible] (149) [illegible] %3.2 [illegible] (156) [illegible] %2.6 [illegible] (170) [illegible] %1.3 [illegible] (172) [illegible] %1.1 [illegible] (194) [illegible] %0.1 [illegible] %2.5 [illegible] 2006 [illegible] (41) [illegible] (45) [illegible] %5.2 [illegible] (43) [illegible] %5.4 [illegible] (72) [illegible] %4.7 [illegible] (49) [illegible] %5.2 [illegible] %1.3 [illegible] (75) [illegible] %0.9 [43].

ب- Ǖ ýƒƨƙ ƘǕƥƶǆ ŦǒǆǕƒ ǇǒǊ ǇǑƺ!ǄǊ(15 ǓǇ Ŧǆ5 ǅǆ5 ŝǍù5) ǑùƊ!ƒ ǇƱǍù!ƒ

ǑǊƨƶ!ƒ ǑNj ǑǕƒ Ĭ ǆǕƒ ǇǒǊ ǑǕƒ ǅǒ!ǅƥǕƒ Ǒ5 ǓǅǆƸ!ƒ ǕǑǂ ƗǊ ƘƺǊ %29.7 Ǒ5 ǆǅùƵ

2005 ǆǅǇƨǅǆ Ŧǉƨ ýǆ %23.3 Ǒ5 ýǍƥ!ƒ ǓǅǆƸ!ƒ %0.9ǍǓŦǒǆǅǇ!ƒ Ǒ5 ýǍƥ!ƒ ǆƥǍǆǆ!ƒ Ŧùǆƥǆǆ

ǍǍ %9.7 Ǒ5 ýǍƥ ǅŧǒƨǆǒ ǅŧǕǑ!ƒ ŦǒǉǒƙǕǕ!ƒ ǑǊǑƨǅŧ!ƒǍ %9.3 Ǒù5 ǑùT ŝƨùǓǅ ǅǒùǓǅ

ǍǑŧǕǑǓǅ!ƒǍ. ǍǓǅǅǅƙƙ ǍƓƶ!ƒ ýǍƥ!ƒ ŦǒǊƨƵ!ƒ ǅǆǒ5 ǍǅǒǊǆǒǊ ǍǑƺ Ĭ ǆǕǅ ǉǅǆ ýǍƥ ǅǆƵ ǉǕƥùƵǆ!ƒ

Ǒ5 ǅǒǍŧ!ƒ ǉǒǍ %6.7 ǍǅǆùǅǓ ǍǑƱǓùǅǅ %7.6 ǍǅǕƥƨǕƒ %8.9 ƥùƱǕ ƨùƱƥ %11ǍǍ

ǑǕǑƨǅƒ ǍǍ %11.3 ǇǑƨǑ!ƒǍ ǍǍ %13.5 ǅùǒǆǒ!ǍǍ %15.8 ǍǅƵǓùǆ!ƒǍ ŦǒƥǍƵǓù!ƒǍ

ǍǍ %17.1 ǅǍǒǅǓǍ ǍǍ %20.2 ǅǍǓǅǒǍǑ ŦǆǒƱǓǍ ǍǍ %20.6 ǍǅǆǅƵ ǍǍǓǅùǍƙǍ %25.7 ǍǍ

ǆƱƨ ǍǍ %28.6 ƨƒƒƨƞ!ƒ ǍǍ %30.1 ǍǓƥǍǓ!ǍǓ ǍǍ %39.1 ƳƨǆƵ!ƒ ǍǍ %47.7 ǍǍ

ǓǑƨǍǅǆ ǍǍ %48.2 ǍǒǆǑ!ƒ %55.9. [44] ǍǆǓ ǅƨǒǆǍǆ ǇǆǍ ǇǍ ƘǒǅǒǓǍ!ƒ ƙƨǒƙ ƨǒT ǍǑ!ǆ Ĭ

ŦǒǆƙǆƙǕƒ ƘǅǍƱƙǆǆ ýǆ ĬƬǆǆǒ Ǖ ǆǆǆ ŦǒǆǕ! ǑǍƨƵ!ƒ ýƥǆǆ!ƒ Ǒ5 ǍǑƱǓǆ ýƞƒƨƙ

ƨƬùƵ!ƒ ǎƥùǆǆ ĬǍƵ ǅǍǓǅǆǓ ŦǒǍƒǆ ŦƱǆǆ ǍƠǆǆ ýƞƒƨƙ!ƒ ƒƦǒ ƨƥǆǒǍ ǍŦǒǍƨƵ!ƒ

ǍùƠǆ Ĭù!ǆ Ɯǆǅƙ ƥƤ ŦǒǍƨƵ!ƒ ýǍƥ!ƒ ǆǆ Ĭ!ǆ ƨǒTǒ ǆǆǆǆ ǍŦǆƨƮǆǆ!ƒ ƘƒǍǆǓ

ǑùNj ǅùǆ ĬǆƵ ǆƥǆƙ!ƒ ŦƵƨǓ ƘƨǆƙǓƒ ƒƦ ŦǒǆǕƒ ĬǆƵ ǅǅƣǆǆ! ƥǍǆƵ Ŧƛǆǆ

ƨƥùǆǒ ǑùƙǕ!ƒǍ ƘǅǅT!ƒǍ ƘǅƺǅǑ!ƒ ǅǅǕƒ ǇǒǊ ŦǒǆǕƒ ƨŧƨƙ ƱǆǕǒǍ ǆǒǆƵ

Ǒ5 Ǒ!ƒǍƙ!ƒ ĬǆƵ ǇǒƙƑ!ƒ Ǒ!ǆǆƞǆ ǇǆǇ (%10.6)Ǎ (%40.3) ǍǆǅǍ ǅǆǆǒ!ƥǆǆ

ǆǇƵ 2005ǆ. [45]

ج- ǑǆƱǆ!ƒ ǆǆǅǇ!ƒ ǇǆǇ ŦǍǅǇŧ R&D ƨǒǍƱƙ!ƒǍ ŧǍǍ!ƒ ĬǆƵ ŝǅǆǇǕƒ ǑǇƥƙ

ǑǑǅǆƞǕƒ ǍǒƱ ŧǒƱ ƘƺǍǍ %0.20 ǆǅǇƨǅǆ Ŧǉƨ ýǆ %2.4 Ǒ5 ýǍƥ!ƒ ŦǆƥǆǆǆƵ

%1Ǎ Ǒ5 ýǍƥ!ƒ ǍŦǒǆǅǇ!ƒ %1.6 Ǒ5 ýǍƥ ǑƨT ŝƨǓǅ ǅǒǓǅ ǍǑŧǕǑǓǅ!ƒǍ %0.6Ǎ

Ǒ5 ǑŧǒƨǆǍ ŦǒǉǒƙǕǕ!ƒ ǍǑǒǆƨǅŧ!ƒǍ ƘƨƥƮƙǍ ƩǍǍƙ ǍƨƳǆǒ!ƒ ýǍƥ!ƒ ŦǒǍƨƵ!ƒ

Ǒ5 ƨTǆǆ ǅǆǒǆ ǅǆǒǆǕƒ ŝǅǆǅǕƒ ĬǆƵ ǍǍǍ!ƒ ǑǆǆƵ!ƒ ƨǒǍƱƙ!ƒǍ ǇǆǇ ǆǆǆǇ!ƒ ǑǆƱǆ!ƒ

ǑǑǅǆƞǕƒ ǍǒƱ ŧǒƱ 0.6% ǇǆǇ ǇƒǍǓ!ƒ 0.30% ǍŦǆǆǆǆ!ƒ ŧǍǒƨƵ!ƒ

ƧƥǀƘǍ .lƧƘƽ!ƒ ǁƘ ýǘP ƘǴǊǴƺ! ƗǒǂŦ!ƒ ƗơǴƪǆ!ƒ ǇǆǅǆLjǅ (%13) ǍơǊ ƧƥǀǑ ǐǍLjƪ
ƗơǴƪǆ LJǅ (%12) Ǒ!ƒǍơ ǑƧƵ!ƒ LJƱǍ!ƒ Ǒƽ ƘǴǊǴƺ!ƒ LJǅ Ɨ!ƒƨǅ!ƒ ƗơǴƪǅ!ƒ
(53) .yƧǅ ƧƘǅ ǍǂǑŦ ƻ!Ɖ (835) Ǒ!ƒǍơ ǴnjƘƒƦ lƧƘƽ!ƒ ýǘP lƧƥǀǅ!ƒǍ ǅ!ǴƵ!ƒ ƘǴǊǴƺ

ÜƘǴǊǴƺ!ƒ ljƦǋ LJǅ ƥpǴƽ!ƒ ƯǒǍƵƘ! ýǴƵƽ!ƒ ƌǒƧƱ!ƒ ƘǴǊǴƺ!ƒ ƗƵƒƧƨ lƥǴƵƹ ƥƵƘǍ
LJƉ LJƵ lǍǘƵ ÜƥpǴƽ!ƒ ƘǛƥƵǅ LJǴǒƨƒǍǒ Ǜ ƘǴǊǴƺ!ƒ ƗƵƒƧƨǍ ƧǒƞƬƘ!ƒ ýƥƵǅ LJƉ ƥǒ
ǐƦ!ƒ ǐǍǒơ!ƒ YǍLjƘ!ƒ Ǒƽ ƚƥơǒ ǐƦ!ƒ LJƒƥǀƽ!ƒ ƯǍƵƘ Ǜ ƘǴǊǴƺ!ƒ ƗƵƒƧƨ lƥǴƵƹ
.ƗǒǂƬǕƒ ƘǴǊǴƺ!ƒ ǈǅƯƘ

Ǒ!ǴƘ!ǴǍ ÜƗǒƧƵ!ƒ ƗǒƵƒƧƨ!ƒ ƗǒǅLjƘ!ƒ ǏǂƵ ǴƱǍƺƯ ƘƒƧǍƱƘ!ƒ ljƦǋ ƘǂŦƬ ƥpǍ
lǍƞƽ!ƒ ƗǅǒƥƘƺǂ ƚǒơ ÜƗǒƒƒƦƺ!ƒ ǈƘǴǂƱƘǅ ƥƪ LJƵ ƒƨƞǴƵ ǑƧƵ!ƒ LJƱǍ!ƒ ƠƬƉ
LJǅ ǅƹƧ!Ǵ ÜƧǛǍƥ ƧǴǂǅ (18.2) Ǒ!ƒǍơ ǅ2006 ǅǴƵ ƗǒǴnjLj yǅ ƗǒƧƵ!ƒ ƗǒƒƒƦƺ!ƒ
(54)ƗǒƧƵ!ƒ ƗǒƵƒƧƨ!ƒ ƗǒǅLjƘ!ƒ ƥǍnjƞ ǏǂƵ ƥǍǀƵ ƗƵƧƉ LJǅ ƧƛŦƉ ƧǍƧǅ

:ǏǅǁƒyǁƐ ơƒƬƗƽǛƐ Ǐƺ ƚƒǅǒơǅǛƐ -ƒyǴƐƥ

ƥǴƬƘpǛƒ ǁǴǅƥLjƒ ƧƬƋǅ Ǒƽ ǴƱǍơǂǅ ǴƵǴƽƘƧƒ ǑƧƵ!ƒ ƥǴƬƘpǛƒ ƥnjƬ
ƧƬƋǅ yƽƘƧƒ ƚǒơ ƗǒƯǴǅ!ƒ Ɨƛǘƛ!ƒ ƥǍǀƵ!ƒ ýǘP Ǒǅ!Ǵƺ!ƒ ƥǴƬƘpǛƒ Ǒƽ ǑƧƵ!ƒ
(Ǒ!ǴǅƞǛƒ ǑǂơǅƦ!ƒ ǋƘǴLj!ƒ / ƘƒƥƧƒǍ!ƒ + ƘƒƧƥǴƬ!ƒ) ǐƥǴƬƘpǛƒ ƻǴƬŦLjǛƒ
(55) .ǅ2007ǅǴƵ Ǒƽ (%88) Ǒ!ƒǍơ Ǐ!ƹ ǅ1970 ǅǴƵ Ǒƽ (%26)LJǅ

LJdž LJĂLjǴžŏ ŎŀƧƵ LJĂŏǁdž (68) Ŏ!ƒĂơ LJŒ5 ÜŎ!Ăþ!ƒ ǁLjŀ!ƒ ƧŏƧǴlǩ! ǴI5ĂĂ
Ĭ!ǫ LJŏʒ!Ǵŀ!ƒ LJŏŀ ŧŀǴǩŧ!ƒĂ lƇƒƧl!ƒ ŧ5ƧƵdž ýþƶdž ýƮŏĂ. ĭƧTŀ!ƒ ƧI5!ƒĂ LJǴdžƧơ!ƒ
ŧơ!ǴƮ!ƒ ljǴŏdž!ƒ ĬǁƵ ƔƧƶ!ƒ LJǴŧƪ!ƒ LJdž (%14) ýƮơŏ ŬĂ Ü(%69.1) Ăơlj
ĭƦ!ƒ ƘpĂ!ƒ Ŏ5Ă .ƔƪǴljdž!ƒ ŎơƮ!ƒ ƻƧƮ!ƒ Ďnj! Ƨ5Ăǩŏ Ŭ (%29)Ă ÜƔƧTǁ!
Ŏ!ƒĂơ 2006 ĎǴƶ! Ŏ!ǴdžηŰƒ Ŏǁơdž!ƒ ƝǩǴlj!ƒ LJdž þƧ5!ƒ ƔŏƮlj ƱƪĂǩdž NJŏ5 ƩǁŀŏŁ
ÜLJdžŏ!ƒ Ŏ5 ƧŬĂþ (930) Ĭ!ǫ ƧþơLjŏ NJLjŒ5 ÜƘƒƧǴdžŰƒ Ŏ5 ƧŬĂþ (23950)
.[58]ŎŀƧƶ!ƒ LJƱĂ!ƒ ƧǴƱpĎ LJŏŀ Ƨŏŀŧ!ƒ ƘĂǴ5ǩ!ƒ Ďηơ Σŧƶŏ ƒƦNjĂ

ŧŏƵǴdžǩηŬƒĂ ŧŏþǴƮǩpŬƒ ŧƑŏŀ!ƒ Ŏ5 ƧĂNjþǩ!ƒ ydž NJLjĎ ÜƚƇĂƪ ƧdžŪƒ þŏƨŏ ǴdždžĂ
þǴƮǩpŬƒ Ŏ5 ƱƒƧƤLjŰƒ LJdž þŏƨdž!ƒ Ĭ!ǫ ƱĂʒư!ƒĂ lĂƵþ!ƒ þƵǴƮǩǩ Üŧŏŀƶƶ!ƒ
ŧǁƛdžǩdž!ƒĂ Ŏ!Ăþ!ƒ þIlj!ƒ ƭĂþljƮĂ Ŏ!Ăþ!ƒ ǁLjŀ!ƒ ƘǴ5ƮĂ ƭŏŀƱǩĂ ÜŎdž!Ǵƶ!ƒ
ŧǁŧTdž LJdž ƻ5Ƥǩ LJĎ yƱǩƪǩ Ď! Ŏǩ!ƒĂ Ŏǁŧŏnj!ƒ ƻŏŏŧǩ!ƒĂ ѲŭƮŰƒ ƝdžƒƧŀŀ
ŧŏƱ5lj!ƒ Ƨŏʃ ŧŏŀƧƶ!ƒ ýĂþ!ƒ ǴnjLjdž ŎLjǴƶǩ Ŏǩ!ƒ ŧŏηƧǴƤ!ƒ ŧŏŀƧƶ!ƒ ŧŏLjĂŏþdž!ƒ
LJdž ýpĎ ƘLjǴŧ LJĎ þƶŀ Ď2006 ĎǴƵ Ŏ5 ƧŬĂþ ƧǴŏǁdž (137) ƘpǴ5 Ŏǩ!ƒĂ
[59]Ŏư Ǵdž!ƒ LJƧl!ƒ LJdž ƘǴŏLjŏLjǴdžƛ!ƒ þlƵ yǁƱdž ydž ƧŬĂþ ƧǴŏǁdž LJŏƪdžƤ

ĬǁƵ lƧƱŏƪ!Ǵŀ ăƧŀŧ!ƒ ŧŏƵǴljƮ!ƒ ýĂþ!ƒ NJŏ5 Ƨdžǩƪǩ ĭƦ!ƒ ƘpĂ!ƒ Ŏ5Ă
Ưƶŀ Ĭ!ǫ Ǵnjdžþlǩ Ŏǩ!ƒ ŧŏƑǴdžljŰƒ ƘƒþƵǴƪdž!Ǵŀ ѲĂǁǩ ǴnjljŒ5 Üŧŏŀƶƶ!ƒ ƘƒĂƧƛ!ƒ
ƘǴŏLjŏLjǴdžƛ!ƒ ĭþlƵ ýŭƤ ǾUĂơǁdž ǾƱĂŀNj ƘþnjT Ŏǩ!ƒĂ ŧŏŀƧƶ!ƒ ƧǴƱpŪƒ
Ŏ55 .lþŏþη!ƒ ŧŏ5!Ūƒ LJdž Ĭ!ĂŪƒ ƘƒĂljƪ!ƒĂ ÜLJŏƧTƶ!ƒ LJƧl!ƒ LJdž ƘǴŏLjŏƶƪǩ!ƒĂ
ƘƒþƵǴƪdž!ƒ ŧljη! ýĂþ) ŧơLjǴdž!ƒ ýĂþ!ƒ ƘƒþƵǴƪdž NJŏ5 Ƙʒǁŀ ĭƦ!ƒ ƘpĂ!ƒ
Ƙư5ƤLjƒ ÜĎ1977 ĎǴƵ Ŏ5 ƧŬĂþ ƧǴŏǁdž (16) Ŏ!ƒĂơ (DAC ŧŏƑǴdžljŰƒ
Ƈƨη!ƒ LJĎ Ƨŏʃ. Ď2004 ĎǴƵ Ŏ5 ƧŬĂþ ƧǴŏǁdž (12) Ĭ!ǫ ƘǁƮĂ Ĭǩơ ǴŏηŏƧþǩ

- [illegible]
- [illegible]
- [illegible]
- [illegible]

[illegible] (103.4) [illegible] 1985-2007 [illegible] 2007 [illegible] (14.0) [illegible] (%44) [illegible] %35 [illegible] (%12) [illegible] %6.

[illegible] 2007 [illegible] 5,500 [illegible] (%39.2) [illegible]

[illegible]

[illegible]

[illegible]

ǴŏǃǴƱŏǫĂ Ü%3.6 ǴŏǰǴǖƪDŽĂ Ʊǀ5 %4 ǴŏǃƒƧƙƪDŽ ƘǕǀƙƪƒĂ Ü ŧŏƑǴǀƙǰƒ Ƨƛǂǂ ǀƧƞǌǃ
(70).%2.6

ƘǴƑŏǌǃƒĂ ƘǴǈƲǰǈǃƒ ƯƶǖĂ ŧŏǖƧƶǃƒ ýǈƶǃƒ ŧǈƲǰǈ ƘƒƇǴƬơǫ ƧŏƬƙĂ
ǀƧƞǋ Lj %31 ùǖ ǈǋǴƪŏ ǑǖƧƶǃƒ ǉƱĂǃƒ ǉǂ Ĭǃǫ ƘƒƇǴǃƒ ǀƧƞǌǖ ŧŏǰƶǈǃƒ
ÜǉŏƪƥǰǌǈǃƒLjǈ %23Ă ƇǴǖƱǕƒ Ljǈ %50 ǉǂĂ ÜŧŏǈǴǰǃƒ ýĂƥǃƒ Ljǈ ƘƒƇǴǃƒ
ƘǴŏǓĂǃƒĂ ǴǖĂƧĂǂ Ĭǃǫ ǉĂƧƞǴŏ ŧŏǖƧƶǃƒ ƘƒƇǴǃƒ ƳĂǈƞǈ Ljǈ ƇǴǈǀƶǃƒ Ljǈ %15Ă
Ǔ ƜƧǴƤǃǴǖ ǉĂƪƧƥŏ ǉŏƦǃƒ ƔƧƶǃƒ ƔǚƱǃƒ Ljǈ %54 ǉǂĂ ÜŧƬǴƤǖ ƒƥǰŧĂ ǀƥơƙǈǃƒ
.ǈǌǰƒƥǕǖ Ĭǃǫ ǉĂƥĂƶŏ

ƇǴǖƱǕƒ ƳĂǈƞǈ Ljǈ %34 ĂơǰǴǰǴƱŏƧǖ Ǒ5 ƔƧƶǃƒ ƇǴǖƱǕƒ ýŧƬŏĂ
ǴǰǴƱŏƧǖĂ ǀƥơƙǈǃƒ ƘǴŏǓĂǃƒ ǴǌƙǈƥǀǈǑ5 ŧŏǖƧƩ ýĂƥ ŧǚƛ ǉǫĂ ÜǴǌŏ5 ǉŏǀǈǴƶǃƒ
ƘƒĂǰƪǃƒ Ǒ5 ƘǈƥƤ ƧƬǈ ǉǂĂ . ƔƧƶǃƒ ǉŏƧƞǴǌǈǃƒ Ljǈ %75 ƔƧǴǀŏ ǴǈƥŏƬƙƙ
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